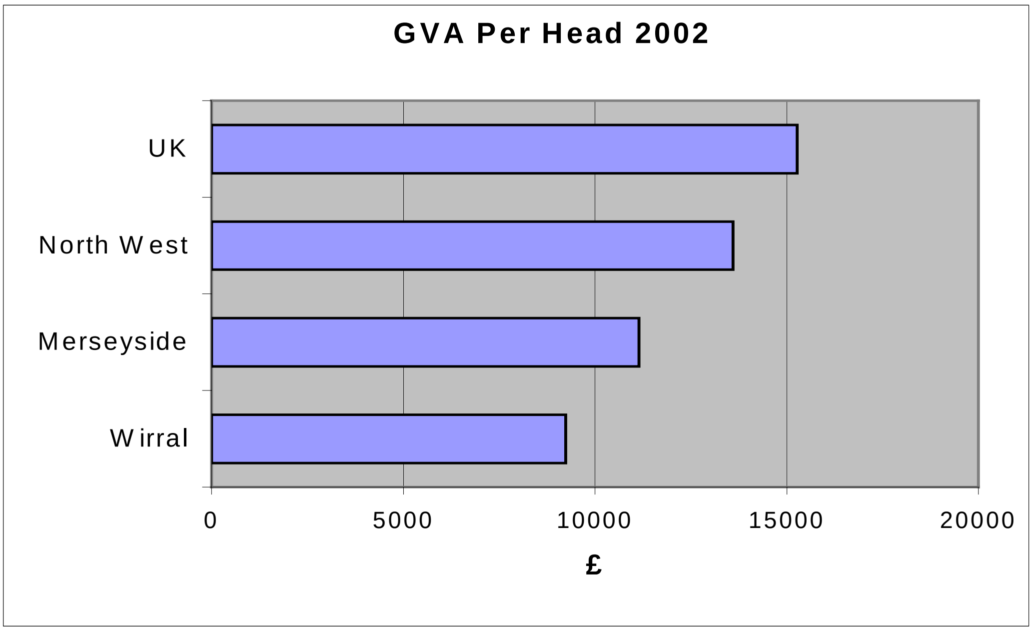
APPENDIX 2 – BASELINE REVIEW

SUSTAINABLE CONSUMPTION AND PRODUCTION

SA Objective 6: To promote improved economic performance

Indicator: *GVA per head (Source: ONS NUTS 3 Accounts December 2004)*

The Wirral's Gross Value Added (GVA) per head currently stands at £9232. This figure is only 60% of the UK average (within bottom five areas GVA per head), 67% of the North West average and only 83% of Merseyside's GVA. Wirral has the lowest GVA per head figure for the Northwest NUTS 3 region (East Merseyside, Liverpool, Sefton and Wirral). "The Gross value added is the difference between output and *intermediate consumption* for any given sector/industry. That is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production"*.



Source: ONS Sub Regional (NUTS 3) Accounts December 2004.

* About National Statistics and ONS
http://www.statistics.gov.uk/about/glossary/economic_terms.asp

Indicator: *GVA as a percentage of national performance*.

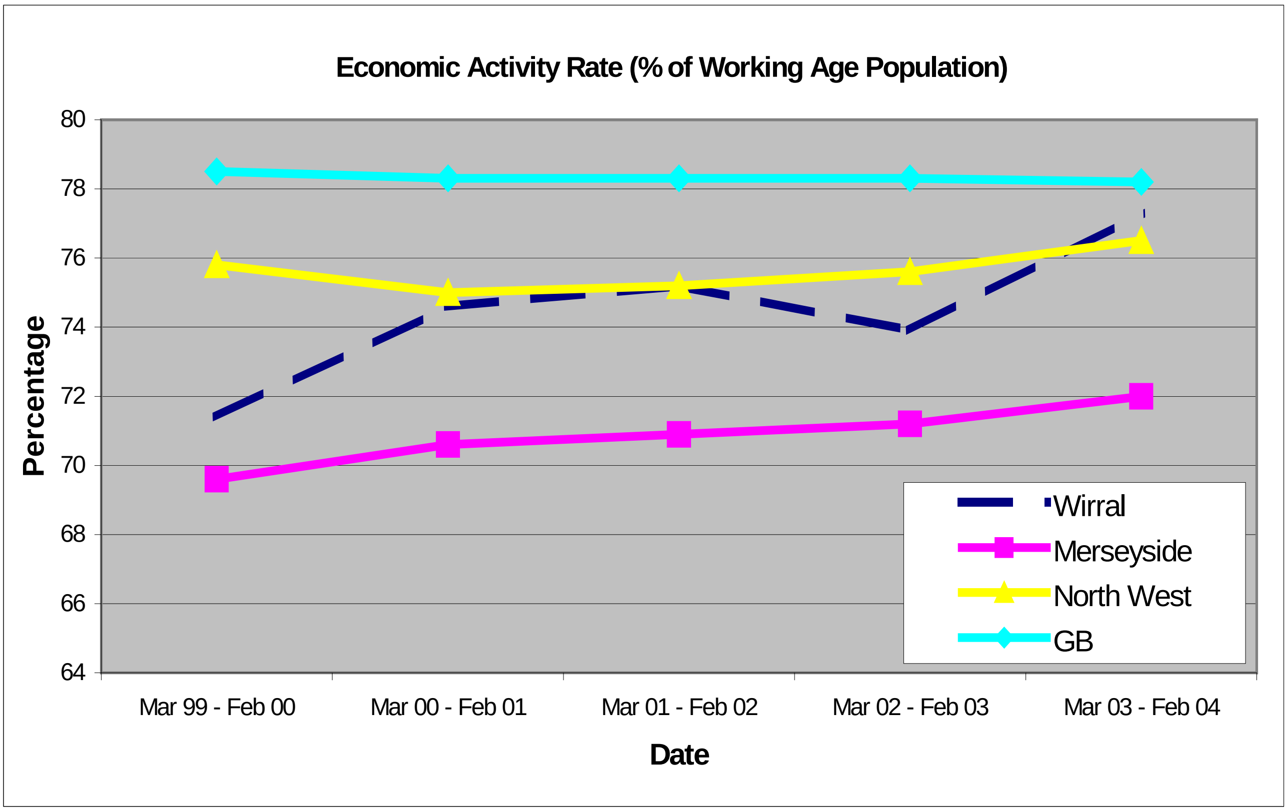
Area	Total GVA in 2002 (£bn)	Share of UK GVA (%)	Growth on 2001 (%)	GVA per Head (£)	GVA per head index (UK = 100)
United Kingdom	906	100	5.1	15,300	100
North West	92.25	9.8	5.2	13,600	89
Merseyside	15.26	1.7	6.0	11,175	73
Wirral	2.90	0.32	5.8	9,232	60

Indicator: *GVA as a Percentage of Sub Regional Performance*

Area	Total GVA in 2002 (£bn)	Share of Merseyside GVA (%)	Growth on 2001 (%)	GVA per Head (£)	GVA per head index (Merseyside 100)
Merseyside	15.26	100	6.0	11,175	100
East Merseyside	3.41	22.4	4.0	10,415	93
Liverpool	6.09	39.9	7.2	13,776	123
Sefton	2.86	18.7	6.1	10,152	91
Wirral	2.90	19.0	5.8	9,232	83

***Indicator:** <u>Economic activity rates</u>* **(Local Area labour force survey Mar02- Feb03)**

The working age population is estimated to be 184,600 of which 142,000 are thought to be economically active. Therefore 77.3% of the working population are economically active, this figure is higher than the Merseyside (72 %) and North West (76.5%) economic activity rates, but slightly below the national figure with 78.2% of the working age population economically active. Wirral's economic activity rate has increased by 5.9% since 1999-2000 compared with a 0.3% decrease in activity nationally.



Source: ONS Local Area labour force survey Mar02- Feb03

SA Objective 7: To provide for employment growth and business creation

***Indicator**: Employment by sector*

	Area			
Sector	Wirral	Merseyside	North West	GB
Manufacturing	12.6	10.7	14.5	12.6
Construction	4.1	3.5	4.7	4.4
Distribution, hotels & restaurants	26.2	24.7	24.9	24.7
Transport & communications	2.9	4.8	6.1	6.0
Finance, IT, other business activities	15.1	16.3	17.6	19.8
Public admin, education & health	34.7	35.4	26.8	25.8
Other services	4	4.5	4.6	5.2
Tourism-related	9	8.7	8.6	8.1

Source: ONS Annual business inquiry employee analysis (2003).

Indicator: *<u>VAT registration and de-registrations</u>*

"VAT registrations and de-registrations are an indicator of the level of entrepreneurship and can indicate the strength of the business population"[*]. Wirral has approximately 174 business per 10,000 population, compared to the English average of 303 (per 10,000 population)[*]. Therefore Wirral has a low number of businesses and therefore many residents have to commute outside the borough in search of employment.

The number of businesses however has been increasing steadily over the past few years, from a low of 4,855 in 1996 to a total of 5,455 in 2003, an increase of 12.4%.

Year	Registrations	De-registrations	Net Change	VAT Registered Businesses at End of Year
1994	585	690	-105	4,965
1995	525	610	-85	4,880
1996	580	605	-25	4,855
1997	655	495	160	5,010
1998	580	535	45	5,055
1999	585	475	110	5,165
2000	600	525	75	5,240
2001	545	450	95	5,335
2002	535	515	20	5,355
2003	615	515	100	5,455

Source: ONS VAT registrations/de-registrations by industry (2005).

Indicator: **Amount of land developed for employment, by type (completed gross floorspace)**

Data to be collected

SA Objective 8: To reduce worklessness and income deprivation

Indicator: *<u>Unemployment by age and duration</u>*

Data to be collected

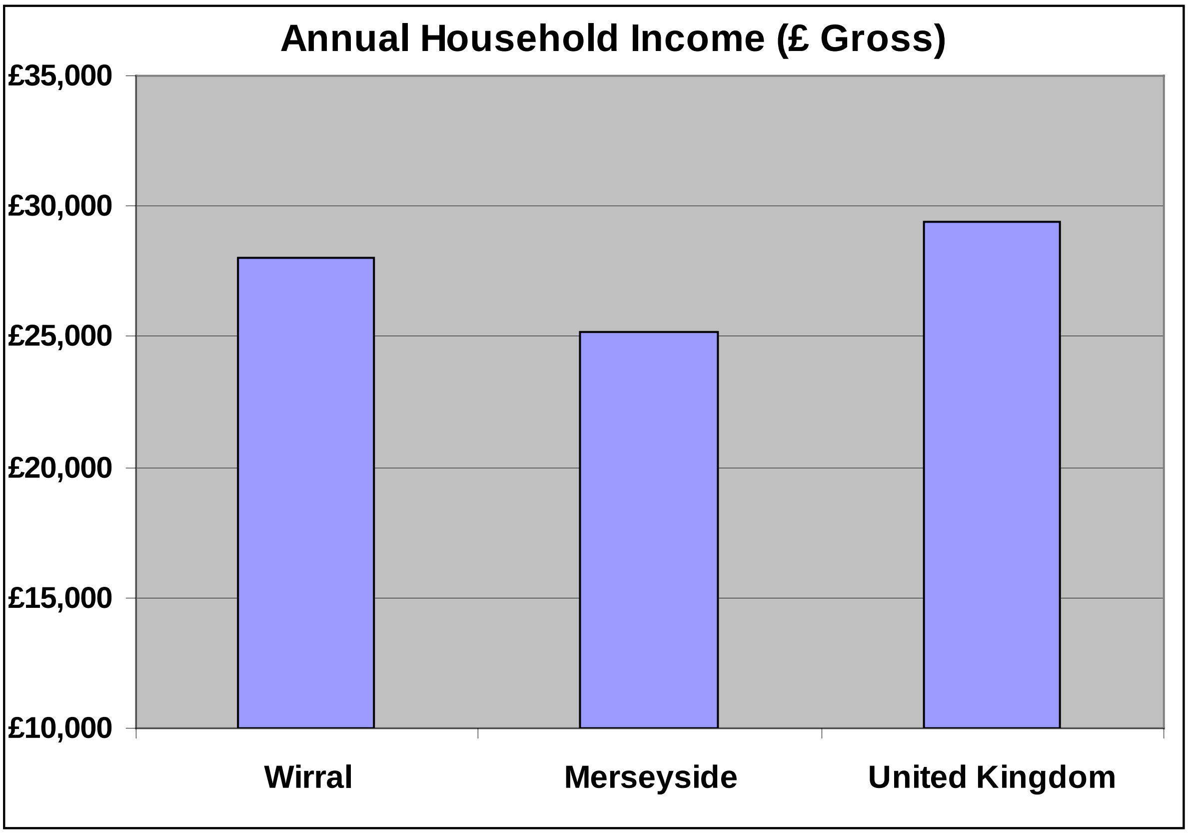
Indicator: *<u>Percentage of people in employment receiving incapacity benefits</u>*

Data to be collected

[*] Wirral Regeneration Framework – Audit and Analysis Report May 2005
[*] Wirral Regeneration Framework – Audit and Analysis Report May 2005

***Indicator:** Average earnings (Annual household income) compared with Merseyside/England*

The average gross annual household income for the Wirral stands at £28, 034. This is 4.6% below the United Kingdom average (£29,374), however it is significantly higher (11.4%) than the Merseyside average of £25,159.



SA Objective 9: To promote the vitality and viability of town centres

Indicator: *Vitality and viability of town, district and local centres measured by (a) position in national shopping centre rankings (Birkenhead and Liscard)(b) percentage of vacant street level property (c) retail rents*

In assessing the health of Wirral's Key Town Centres (see Map below) the 'Wirral Retail Strategy' report written by Roger Tym and partners was widely consulted. The assessment of Wirral's nine key town centres used a wide range of data sources including. Wirral Councils 'Sales Floor Estimates' and land use surveys carried out by Roger Tym's consultants (September/October 2003). The health checks for the key town centres used numeric evidence of the viability/condition of the property market and qualitative sources such as consultation exercises with key stakeholders in the centres.

Key Town Centre	Summary of Area's Health as a Centre of Retail and Leisure	Vacancy Rates	Retail Rents
Birkenhead (Core Area)	Birkenhead's shops are predominantly at the lower end of the market. Birkenhead does not have a full range supermarket, a second department store, middle and higher order clothes/shoes (particularly young ladies fashion), and quality cafes/ Restaurants. Therefore Birkenhead appeals predominantly to a localised client base and fails to attract the more affluent residents, particularly from the western part of the borough. Birkenhead is failing to fulfil its maximum potential as a sub regional centre.	The proportion of vacant property in the town centre (core area) stands at 11.8%, which is only slightly above the GB average (10.6%), indicating a healthy demand for retail property, albeit at the lower end of the market.	Retail rents have grown from £70 per sq ft, rising to £95 in 2003. However rents for Liverpool, Chester and Warrington are significantly higher than in Birkenhead, at £275, £200 and £145 per sq ft, respectively, which confirms their dominance in the region.
Bromborough Village	Overall Bromborough village is a vital a viable town centre. It has sufficient convenience and services shops and the village centre has a pleasant ambience. The village is not a main destination for fashion goods, although the centre's household goods offer is reasonable. Competition is likely to arise from the nearby South Wirral Retail Park.	The number of vacant units has increased from 6 units in 1997 to 9 units in 2004. However the total number of units has increased from 75 to 85 in the same period. Consequently, the proportion of vacant units (10.6%) mirrors the GB average.	No retail rent data currently available.

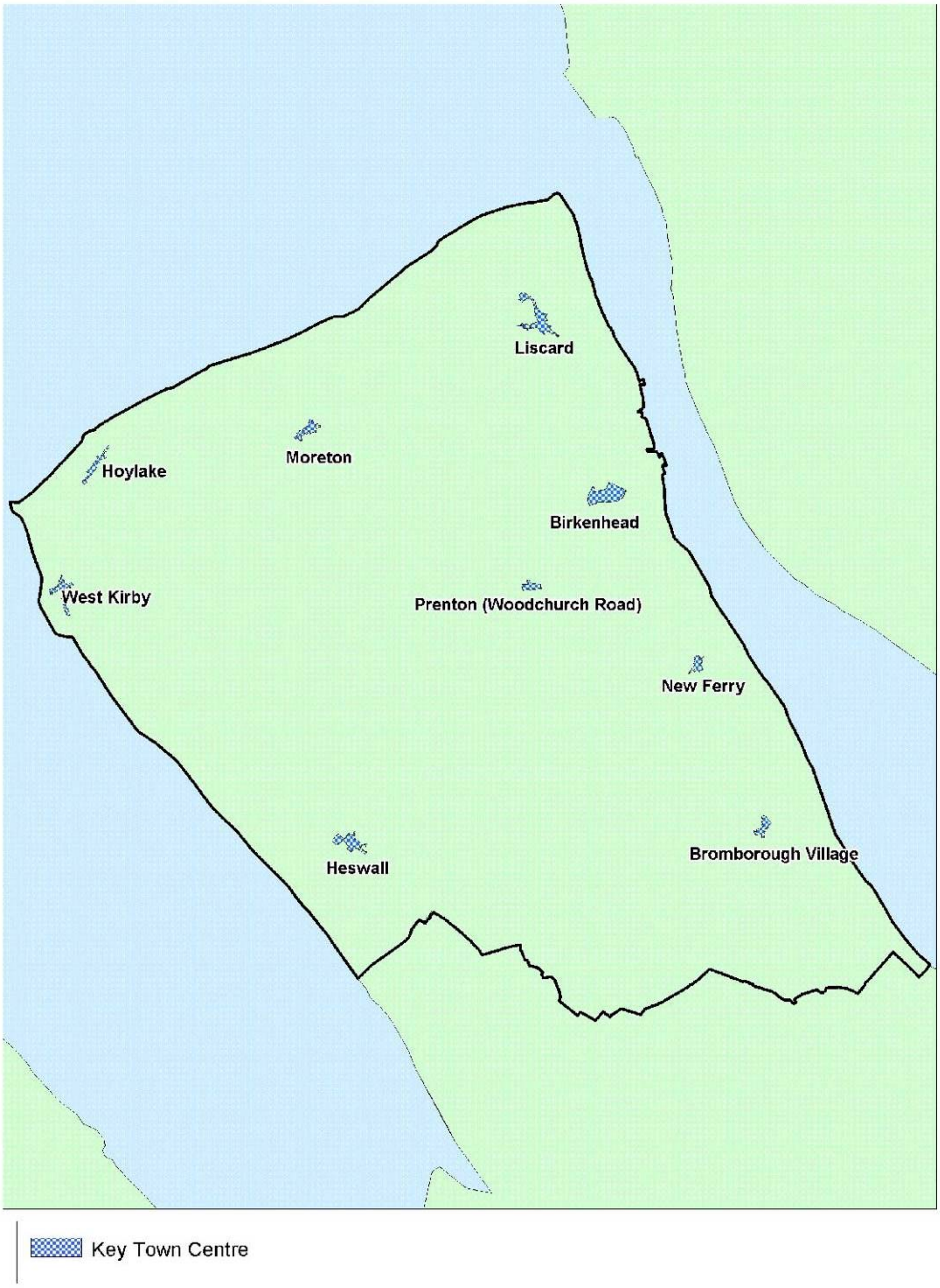
Heswall	Overall Heswall is a vital and viable town centre. The representation by chain retailers in the comparison* sector does not represent the overall affluence of the local population, and parts of the centre are in need of environmental upgrade. Competition is likely Chester City centre due to the major transport links from Heswall Centre direct to Chester centre (A540).	There were 6 vacant units in Heswall in 2004 (4.3%), which is less than half the GB average. This is primarily due to the increase in eating/dining out premises occupying previously vacant units.	Anecdotal evidence suggests that retail rents have increased significantly over the past 10 years. Rent for a standard unit reportedly cost around £6,000 to £10,000 in1994, consultees assert that it now costs in the region of £30,000 to £35,000.
Hoylake	Hoylake's retail centre has deteriorated substantially in recent years, especially in the comparison sector. Hoylake has a poor number of hotels especially with the Open Championship in 2006. A lack of car parking space has also been identified as another major problem.	The proportion of vacant units in Hoylake has remained steady over the past fifteen years and the current level of 11.2% is only slightly above the national average.	No retail rent data currently available.
Liscard	Liscard's centre has deteriorated over the past 10-15 years, with the offer principally at the lower end of the market. Liscard is lacking a department store and middle order clothes retailers (River Island, Next etc) Liscard needs to significantly improve its comparison retail offer and general environment to regain its former position in the retail hierarchy.	Liscard has an above average retail vacancy rate of 13%.	In marked contrast to Liverpool, Chester, Warrington and Birkenhead, rents in Liscard are just £40 per sq ft, which represents only a marginal increase on the 1993 level (£35 per sq ft).
Moreton	Morton is a vital and viable town centre, with a good convenience offer, low vacancy rate and busy feel. However there is a lack of parking, which will be difficult to remedy.	Moreton has 11 vacant units (8%) lower than the GB average (10.6%) and the lowest vacancy rate since 1980.	No retail rent data currently available.
New Ferry	New Ferry has been in long-term decline, and is no longer a strong district centre. The centre is deficient in many respects, with the quality of property and general environment extremely poor. The centre is no longer vital and viable, and significant investment is required to address the major problems.	The current levels of vacancy (March 04) stand at 31.3%, three times the national average.	No retail rent data currently available.
Prenton	Prenton centre enjoys a good level of health, the	Only one retail unit was	No retail rent data currently

(Woodchurch Road)	predominance of independent operators and the limited offer in clothes retailers means that Woodchurch road functions as a district rather than town centre.	identified as being vacant (1.8%). The low vacancy rate indicates a continued demand for units (confined to independent, small-scale operators).	available.
West Kirby	West Kirby's convenience and services offer is healthy. However, the range of comparison outlets does not reflect the affluence of the local population and high quality operators need to be attracted. The town centre is suffering from a long-term lack of investment and needs to be updated and re-energised.	West Kirby has 10 vacant units (6.5%) which is much lower than the national average (10.6%).	No retail rent data currently available.

Source: Wirral Retail Strategy Main Report March 2004. (Roger Tym and Partners).

*The comparison sector is made up of five types of purchase

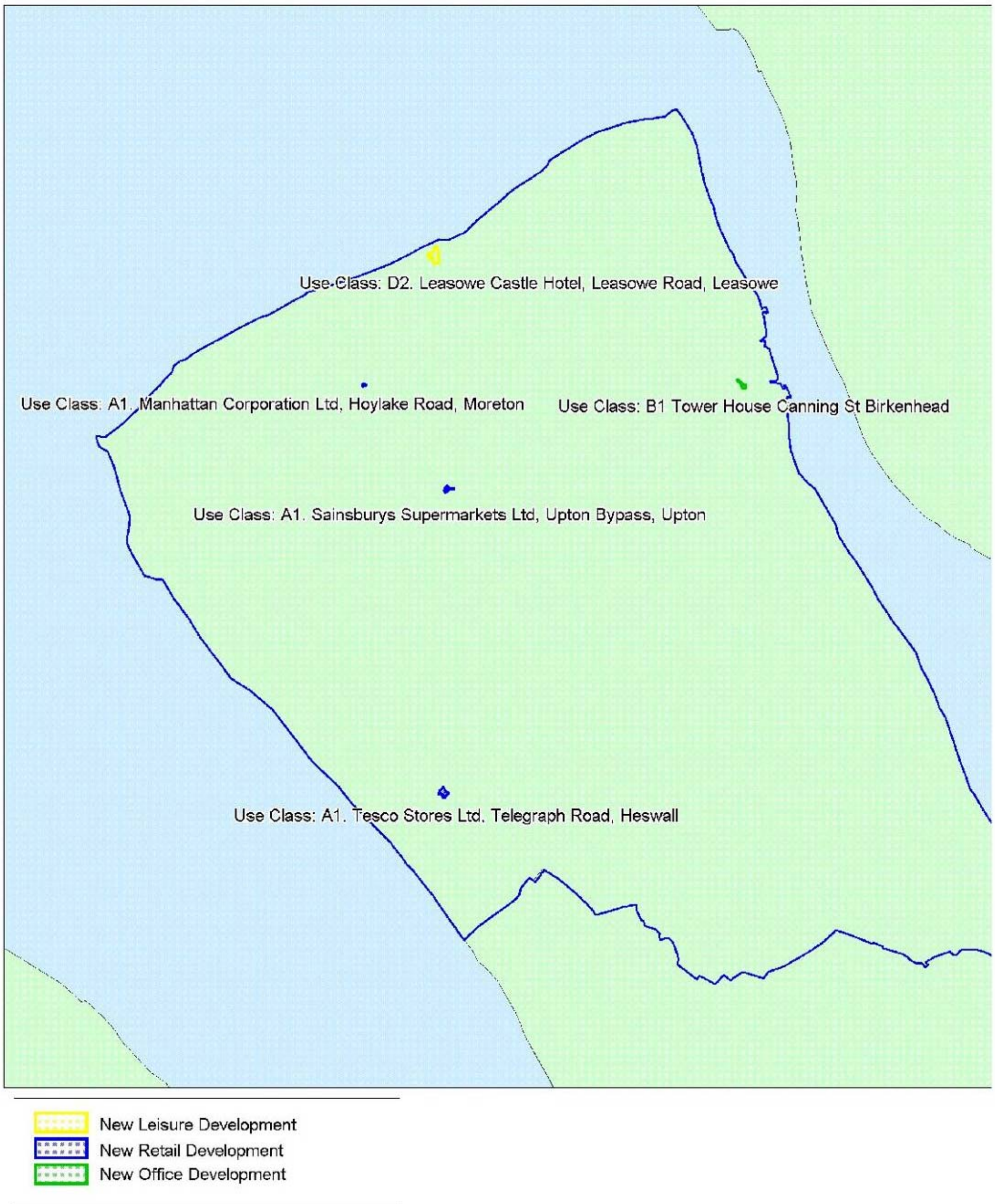
- Clothes and Shoes
- Furniture/Carpets
- DIY goods
- Domestic Appliances (White Goods)
- Specialist non-food items (china, glass, books, jewellery, photographic equipment, music etc)


Liscard
Moreton
Hoylake
Birkenhead
West Kirby
Prenton (Woodchurch Road)
New Ferry
Heswall
Bromborough Village
Key Town Centre

Indicator: *new retail and office development by type and location (sq m developed per annum)*

The table below contains all the completed retail, office and leisure developments for the financial year April 2004 – March 2005.

UCOs	Type	Total Floorspace Developed Sq M (**Gross**)	Total Floorspace Developed in Town Centres Sq M (**Gross**)	Total Floorspace Developed Sq M (**Net**)	Total Floorspace Developed in Town Centres Sq M (**Net**)
B1	Offices	961	0	-	-
A1	Retail	326	0	236	0
A1	Retail	2828	0	2828	0
A1	Retail	1809	1809	1175	1175
D2	Assembly and Leisure	522	0	522	0
TOTALS	**1**	**6446**	**1809**	**4761**	**1175**


Use Class: D2. Leasowe Castle Hotel, Leasowe Road, Leasowe
Use Class: A1. Manhattan Corporation Ltd, Hoylake Road, Moreton
Use Class: B1 Tower House Canning St Birkenhead
Use Class: A1. Sainsburys Supermarkets Ltd, Upton Bypass, Upton
Use Class: A1. Tesco Stores Ltd. Telegraph Road, Heswall
New Leisure Development
New Retail Development
New Office Development

SA Objective 10: To maximise provision for high quality tourism

Indicator: *number and type of visits to Wirral/Merseyside by duration and expenditure*

Area	Overnight Visitors	Day Visitors	Total
Wirral*	457,713	3,623,322	4,081,035
Total Expenditure*	£31.7m	£66.8m	£98.5m
Expenditure/visitor	£69.25	£18.44	£24.13
Merseyside*	2,409,015	16,817,165	19,226,180
Expenditure*	£236.2m	£367.9m	£604.0m
Expenditure/visitor	£98.05	£21.88	£31.41

*Source: The Mersey Partnership. Digest of Merseyside Tourism July 2004.

Nearly 4.1 million tourists visited the Wirral in 2000, of which 88.8% were 'day-trippers' and 11.2% visited the Wirral for one night or more. These 4.1 million visitors generated a total of £98.5 million for the borough's economy in 2000.

Wirral's tourist numbers represent 21.2% of the total visitors to Merseyside. This share is expected to increase over the next few years, with the rise in golf related tourism due to the hosting of the Open Championship at Hoylake's Royal Liverpool course in Summer 2006. The Level of expenditure per visitor in Wirral is however lower than on Merseyside as a whole.

Indicator: *number of visitors to top ten tourist/visitor facilities*

Wirral has a wide variety and number of visitor facilities and tourist attractions, therefore only the more significant attractions in terms of visitor numbers are included in this survey.

The borough has:

- One coastal resort – which includes, amusement arcades and fair grounds.
- Two Art Galleries.
- Four Theatres.
- Twelve Countryside/Marine attractions – including country parks country craft centres and marine lakes.
- Twelve Heritage/Museum attractions – all museum attractions, Mersey Ferries, historic churches.
- Eight Caravan/Camping Sites.

The top 14 tourist attractions in 2003 include.
(* Mersey Ferry figures not included as joint Liverpool/Wirral attraction)

Attraction	2002	2003	% Change
Birkenhead Priory	15,236	13,441	- 12%
Birkenhead Tramway	12,591	13,172	+ 5%

Egerton Bridge	1,509	1,490	- 1%
Floral Pavilion Theatre	65,000	65,000	0%
Historic Warships	26,578	30,047	+ 13%
Lady Lever Art Gallery	125,988	93,675	- 26%
Pacific Road Museum & Theatre	45,500	75,000	+ 65%
Port Sunlight Heritage Centre	20,000	27,632	+ 38%
Seacombe Aquarium	48,254	41,768	- 13%
Shore Road Pumping Station	3,736	3,046	- 18%
Seacombe Spaceport	Opened Summer 2005 (100,000 visitors estimated annually).		
Voirrey Embroidery Centre	175,000	180,000	+ 3%
Williamson Art Gallery	31,561	35,367	+ 12%
Wirral Museum	38,990	42,527	+ 9%
Total	**609,943**	**622,165**	**+ 2%**

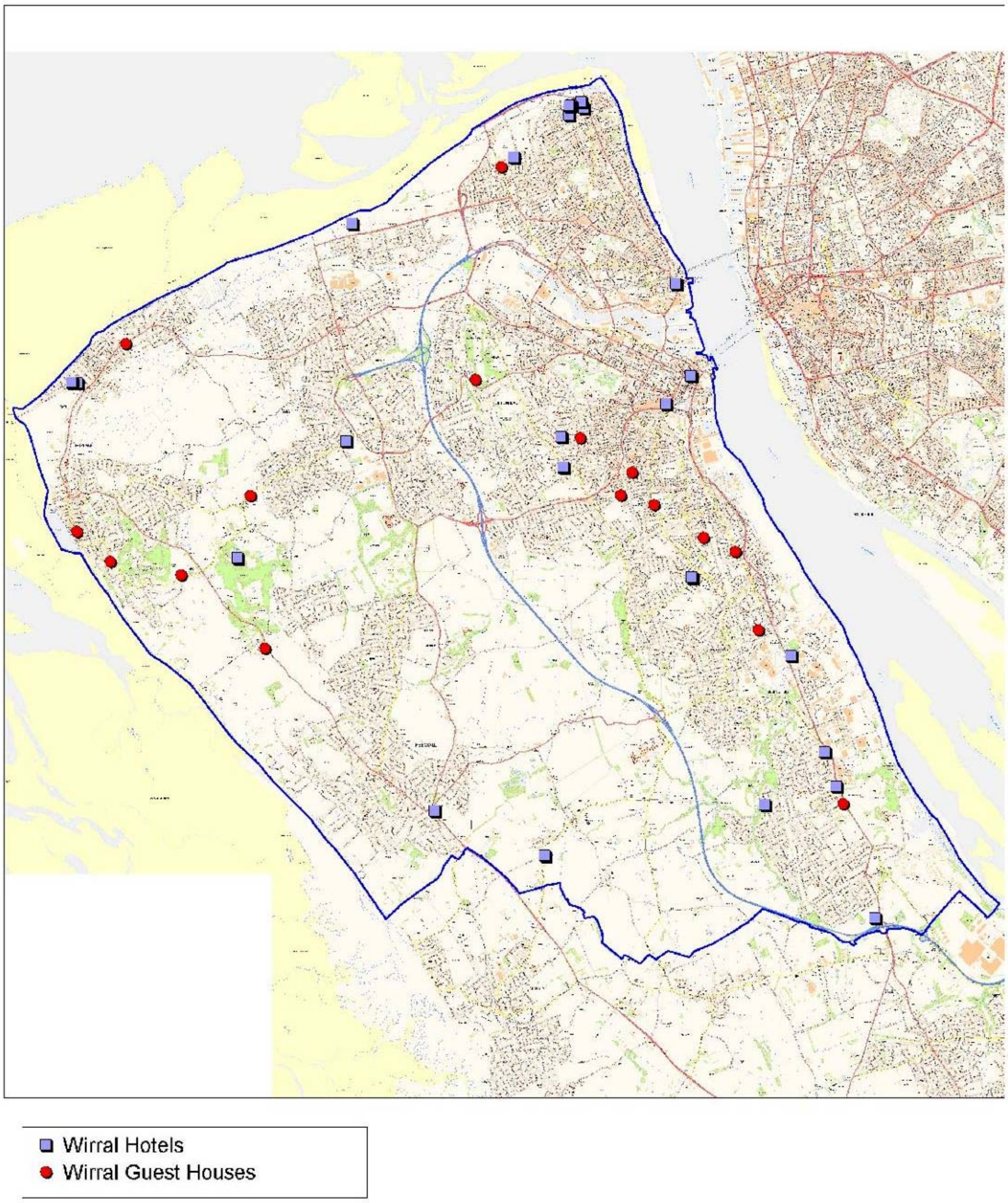
Source: The Mersey Partnership. Digest of Merseyside Tourism July 2004/.

Overall the number of visitors to Wirral tourist attractions has increased by 12,222 people from 2002-2003 (+ 2%).

Not included in the above list is Wirral Country Park which attracted 315,00 visitors in 2005 – 7th in the rank of free admission attractions on Merseyside

Indicator: *Number and location of bedspaces*

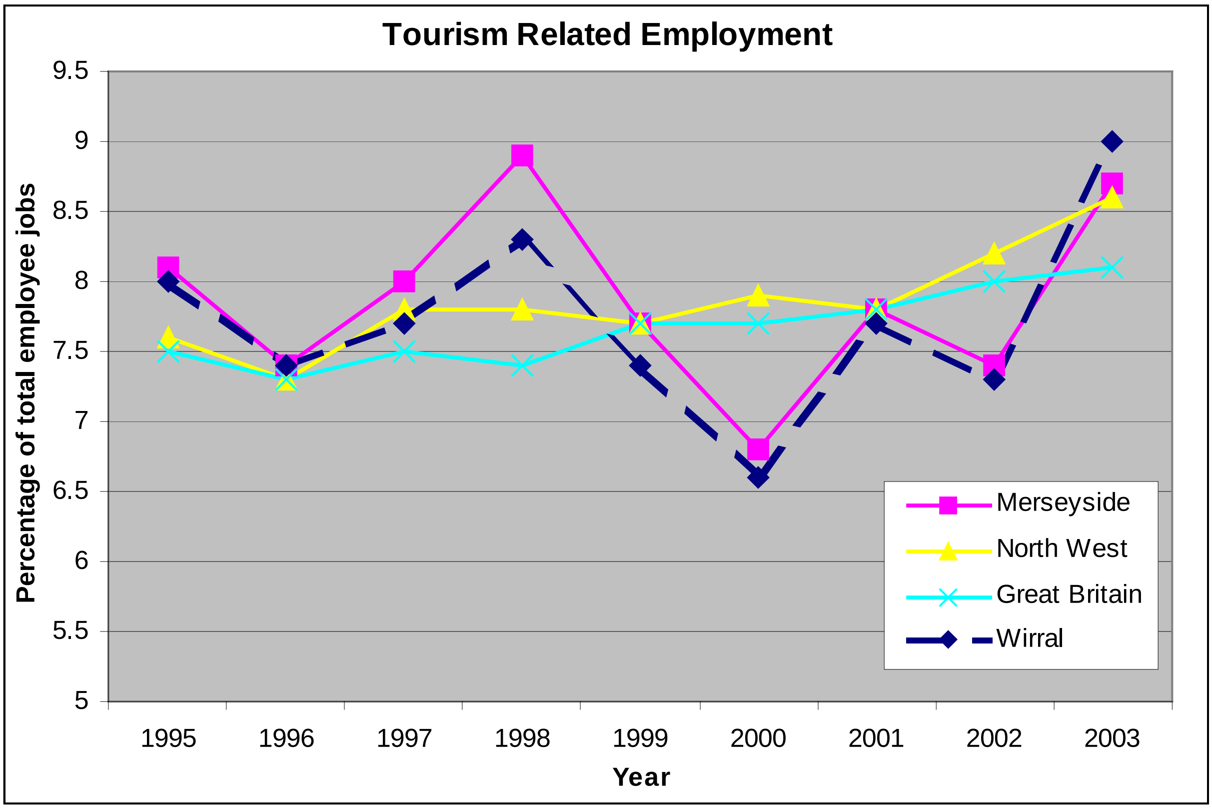
The Wirral has 17 guest houses (103 rooms) 24 hotels (607 rooms), the borough has a total of 710 guest rooms.



***Indicator:** Employment in Tourism*[1]

The number of persons employed in tourism related activities increased by 1% since 1995 to 9,094 in 2003, this represents 9% of total employee jobs on the Wirral. This figure is broadly similar to the Merseyside and North West average, but nearly 1% higher than the national figure.

Since 2000 the number of tourism related employees has risen rapidly from 6,586 (6.6%) to 9,094 (9%) in 2003. The number of tourism related jobs is expected to rise further still with the hosting of the Open golf championship at Royal Liverpool golf club in Hoylake (Summer 2006), and Liverpool's successful bid to become the European capital of culture in 2008.



Source: Annual business inquiry (ABI) employee analysis 2003.

[1] **Tourism-related** includes the following sectors:
551 Hotels
552 Camping sites etc
553 Restaurants
554 Bars
633 Activities of travel agencies etc
925 Library, archives, museums etc
926 Sporting activities
927 Other recreational activities
Source: Annual business inquiry (ABI) employee analysis 2003.